Version

5.4

Integrated Charting

Web-based reporting for ASP.NET

AJAX-enhanced Web-based report designer

Compatible with Internet Explorer and Mozilla Firefox

Exports to PDF, Excel, CSV, Word, OpenOffice, SQL and XML

USER'S GUIDE

Izenda Reports User's Guide v5.4, Revision 4

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Preface

Izenda *Reports* enables you to easily access your databases directly and quickly transform raw data into useful and readily understood information. With *Reports* you can extract the information you need from one or more related tables and format it into tables, reports, or charts. You can view the resulting report in your Web-browser and then print it. You can also export reports in several formats, including Microsoft Word, Microsoft Excel, and Adobe PDF.

Imagine that your boss has asked for a list of outstanding sales orders for each customer. You know that your database has a table called *Customers*, and another table called *Orders*, and that they can be linked together using the common field called *CustomerID*. Using *Reports*, you can "join" the two tables and then choose the data fields you need, such as *customer name*, *phone number*, *order number*, *order date*, and *order amount*. You can use a filter to select only open orders. You can sort the data by customer. Finally you can view or print the report, create the report as a PDF file, or output it to Excel. It is so easy. It is so fast. Your boss will be amazed.

This user manual will step you through each simple process in using *Reports*, and provide you with what you need to know to create your queries and reports. Any data that your application developer has included in the database can be accessible to you in creating *ad hoc* reports.

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1.0 INTRODUCTION TO IZENDA REPORTS

Izenda Reports is a reporting solution that allows you to design and run reports from a web browser. It consists of a Report List, Report Viewer, and Report Designer and other pages that list and view reports.

2.0 QUICK START GUIDE

2.1 Building your first report

- Navigate to the Report List page (http://host/yourApp/ReportList.aspx)
- Click the "Design A New Report" link

Click to design a new report

- Select a report data source in the "Data Sources" tab (the drop-down contains tables and views) like Invoices or Orders

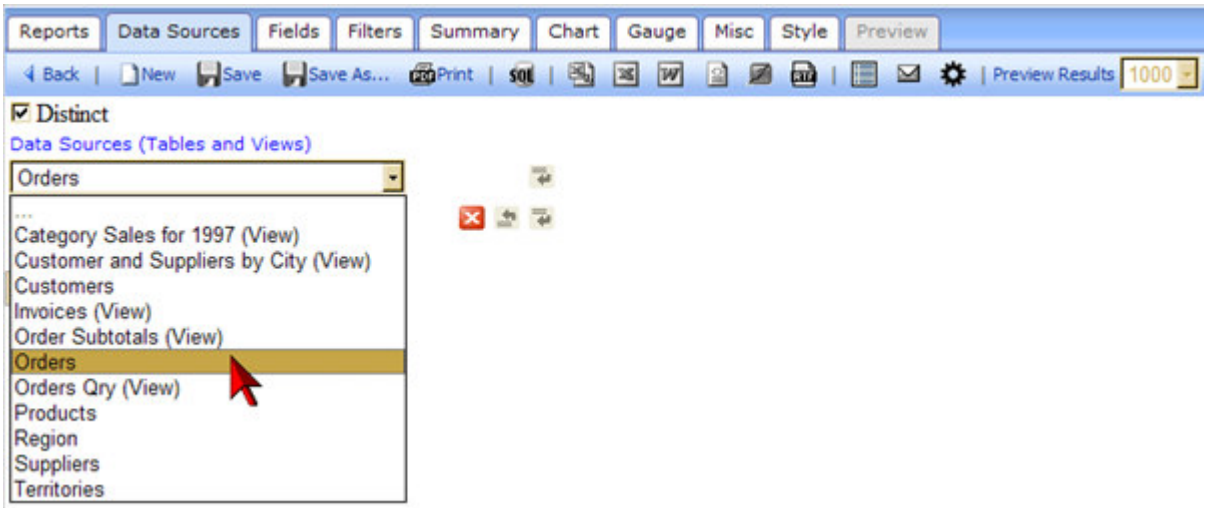


Figure 2-1 Select Views and Tables

- Select one or more fields, such as Lastname, or OrderId, from the "Field" drop-downs

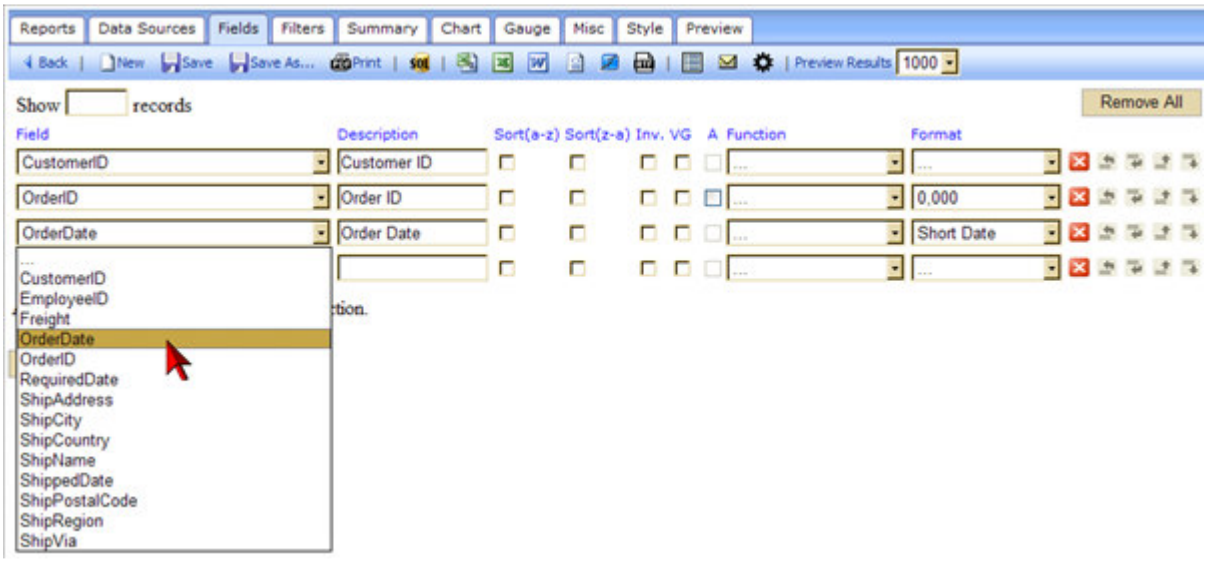


Figure 2-2 Select Fields

- Click the "Preview" tab

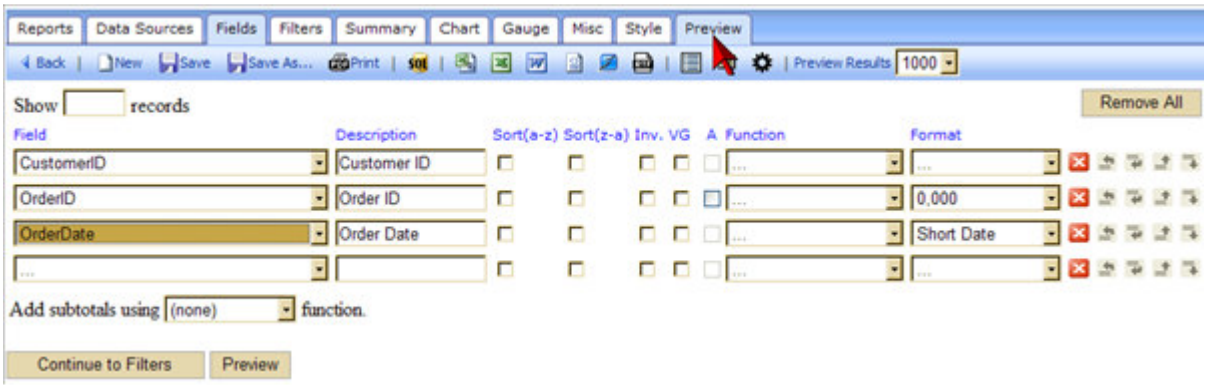


Figure 2-3 Click the preview tab

- Click the "Save" button to save your report

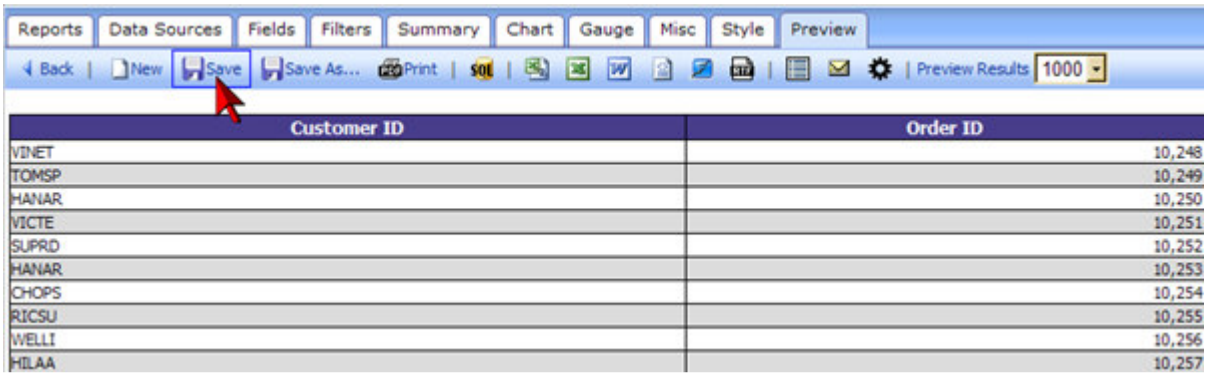


Figure 2-4 Click "Save" to save your report

- Enter a name and category(optional) in the "Save" dialog box

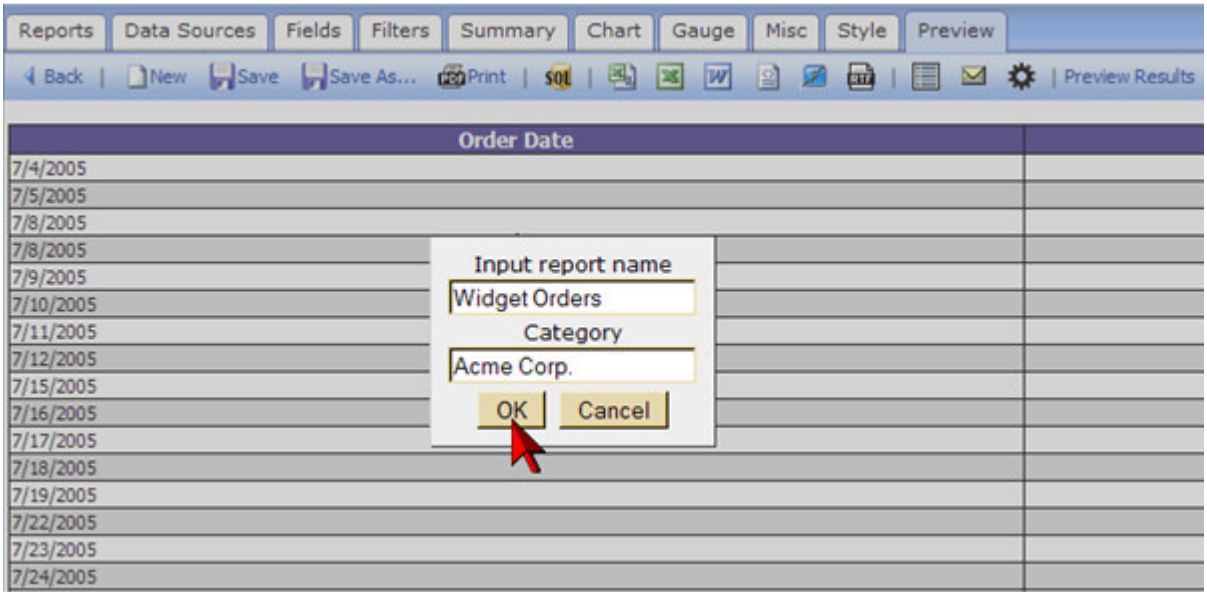


Figure 2-5 Enter a report name and/or report category in the dialog box

You now have your first functional report. This is a very basic example, and Izenda Reports offers far more capabilities.

3.0 THE REPORT LIST

The Report List is first page that you, the user, typically interacts with unless given a link to a specific report. This page displays the list of reports. By default, it displays uncategorized reports first in alphabetical order and then displays an alphabetized list of the reports by category.

Report links are shown in blue below. Clicking on a report link loads the report into the report viewer. You can also click on the delete and modify buttons, shown by the red arrow below (Figure 3-1), to delete the report and load the report into the Report Designer to be modified.

Design a New Report
Reports - A list of saved reports. Click on the report name to view the report or click 'Design' to open the report in the designer.
Report Name
Modified
Sharing
Owner
Categories Details 5/22/2007 1:59:10 PM Shared
Categories Drill-Down 6/18/2007 4:13:47 PM Shared
Category List 5/23/2007 11:24:56 AM Private
Freight Costs By Country and City 8/10/2007 12:55:41 PM Private
Orders By Employee with Chart 5/23/2007 11:25:10 AM Private
Orders for a Single Country 12/12/2006 12:45:53 AM Private
Orders Report 6/18/2007 3:27:35 PM Shared DefaultAdministrator
Product List 12/12/2006 12:45:53 AM Private
Sales By Product and Category 5/23/2007 11:16:11 AM Private
Department Reports
Report Name
Modified
Sharing
Owner
Accounting 8/10/2007 5:28:13 PM Shared DefaultAdministrator
Dashboard 7/24/2007 10:22:47 PM Shared
Finance 8/30/2007 1:38:09 PM Shared
Marketing 8/10/2007 5:23:52 PM Shared
Sales 5/25/2007 2:44:03 PM Private
Shipping 8/28/2007 1:31:48 PM Shared DefaultAdministrator

Figure 3-1 Typical Report List

Using this page (depending on your administrator's setup), you may be able to:

- view an existing report
- create a new report

- delete an existing report
- modify an existing report

All of these options depend upon how your report administrator has configured Izenda Reports. Some, none or all of these options may be available to you.

3.1 Viewing a Report

Figure 3-2 Clickable Report Links

The report names are hyper-links which are clicked to load the report into the report viewer.

3.2 The "Design a New Report" Link

Figure 3-3 Design a New Report Link

This is a special link. Clicking this link takes you to the report designer where you can create a new report.

3.3 The Delete and Modify Buttons

Figure 3-4 Report Link, Delete & Modify Buttons

The delete button allows you to delete a report. Clicking it will pop-up a dialog box confirming your choice to delete.

The modify button allows you to modify the report by loading the report in the report designer. Clicking it will load the report into the report designer.

4.0 THE REPORT VIEWER

The Report Viewer is used to view the reports that are listed in the Report List. The user typically interacts with this page in order to view reports. When loaded, the page displays the report with a menu of options on the top of the page.

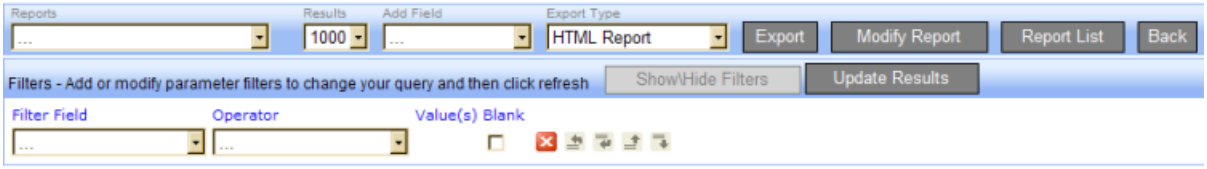


Figure 4-1 Report Viewer

The Report Viewer buttons allow you to do common tasks associated with viewing a report.

Report Viewer Buttons	
Button Name	**Function**
Export	Exports the report in the selected format
Modify Report	Switches to Designer so the user can modify the report
Report List	Displays the list of reports
Show/Hide Filters	Allows the user to either display or hide the filters in the Report Viewer
Update Results	Allows the user to add update the report results after adding/removing filters or fields
Back	Allows the user to return to the previous page

The dropdowns in the Report Viewer also add the ability to add filters, fields and change the export type.

Report Viewer Drop-downs	
Dropdown	**Function**
Reports	Allows the user to select a different report to view
Results	Allows the user to select the number of results in the report shown on the screen (using powers of 10)
Add Field	Adds a new field to the report
Export Type	Determines what format to export the report in
Filter Field	Selects the field to be filtered

Operator	Allows user to choose an operator for the filter

Users can filter in the Report Viewer by using the filter menu shown in Figure 4-2. They have the ability to select filter fields and operators, and to add filters If needed.

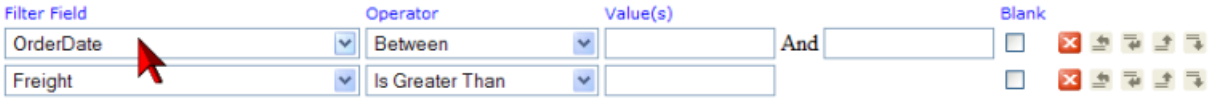


Figure 4-2 Report Viewer Filters

5.0 THE REPORT DESIGNER

The **Report Designer** (Figure 5-1) provides the means to specify parameters for the table(s) of your databases.

Figure 5-1 Report Designer Toolbar

5.1 Reports Tab

The **Reports** tab (Figure 5-2) provides another list of created reports.

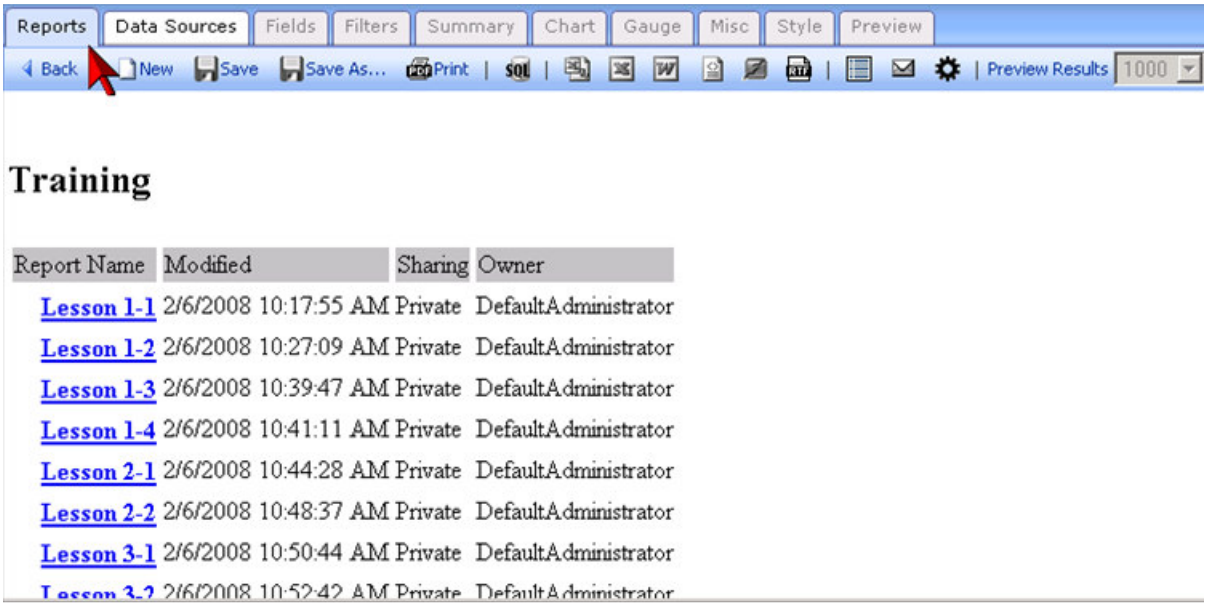


Figure 5-2 Reports Tab

5.2 Data Sources Tab

The **Data Sources** tab (Figure 5-3) shows which tables and views are already stored in the database. and provides a choice of which table to view or which tables you would like to join. To join two tables and/or views, they must have fields with identical entries. For example, both the ***Customers*** and the ***Orders*** tables have the same *CustomerID* field that contains one of several possible entries: beverages, condiments, dairy products, seafood, and so on.

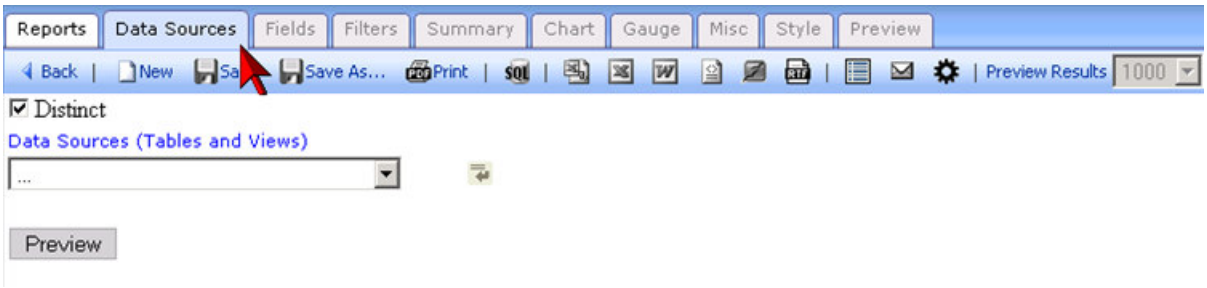


Figure 5-3 Data Sources Tab

5.2.1 Table Dropdown Menu

The **Table** dropdown menu (Figure 5-4) is a list of the tables and views available to the user, as shown in Figure 4. Select the desired table/view to preview. To join multiple tables or views that have a field with identical entries, select those tables/views.
NOTE: A view is a set of tables that have already been joined.

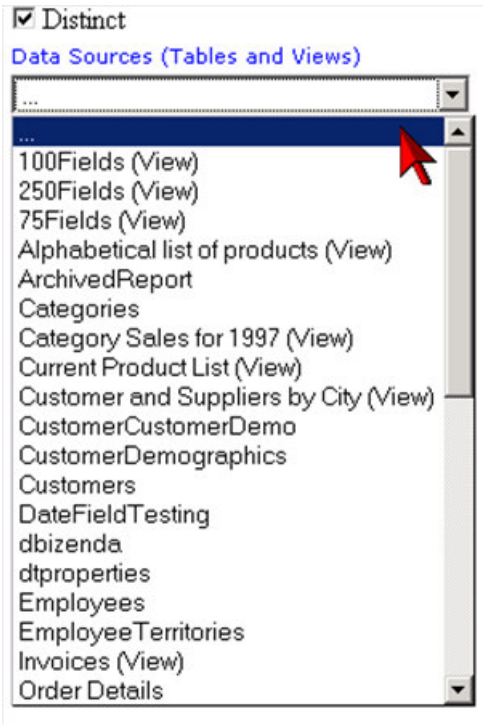


Figure 5-4 Table Dropdown Menu

5.2.2 Join Field Dropdown Menu

The **Join Field** dropdown menu (Figure 5-5) is a list of the fields contained in the table/view selected in the **Table** dropdown menu to the left. Select the field that has identical entries as the table/view that it needs to be joined with.

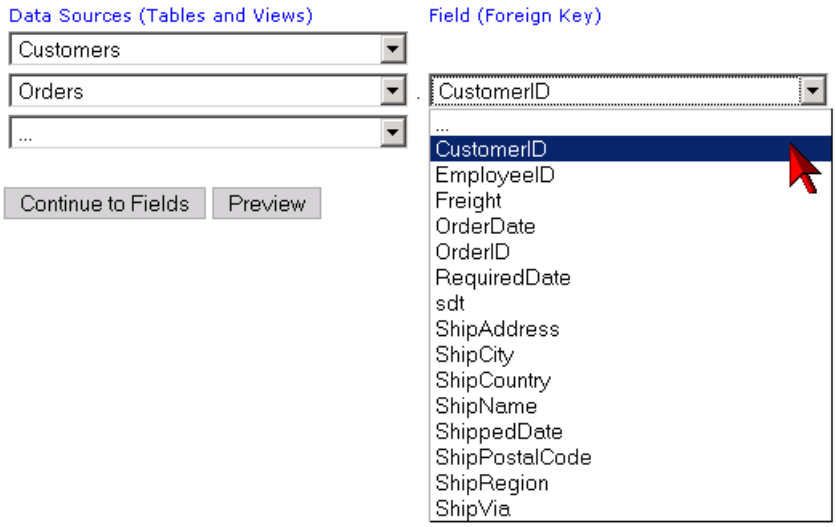


Figure 5-5 Join Field Dropdown Menu

5.2.3 Foreign Table Dropdown Menu

The **Foreign Table** dropdown menu (Figure 5-6) is a list of the tables/views that have been selected in the **Table** dropdown menu, other than the one in that row. Select the table/view to join the table/view in that row.

Figure 5-6 Foreign Table Dropdown Menu

5.2.4 Field Dropdown Menu

The **Field** dropdown menu (Figure 5-7) is a list of fields in the table/view that are selected in the **Foreign Table** dropdown menu to the left. Select the field to join with the table/view in that row.

Figure 5-7 Field Dropdown Menu

5.2.5 Join Type Dropdown Menu

The **Join Type** dropdown menu (Figure 5-8) is a list of the available joining methods. The "Inner" method discards any objects from the joint fields that do not have an identical match. The "Left" method still displays those without an identical match

Figure 5-8 Join Type Dropdown Menu

5.2.6 Function Buttons of Data Sources Tab

From examples in sections 2.2.2 to 2.2.5, two tables, **Customers** and **Orders**,have been used. *CustomerId* is the join field of both the ***Customers*** and ***Orders*** table and *Inner (direct)* is the join type.

Figure 5-9 Function Buttons

The , , and function buttons are defined in Table 2 below.

Icons	Control Name	Description
	Delete button	Click this button to delete the row the button is on.
	Insert Row button (above)	Click this button to insert a row above the row the button is on.
	Insert Row button(below)	Click this button to insert a row below the row the button is on.

Table 2 Function Buttons of Data Sources Tab

5.3 Fields Tab

In the **Fields** tab, choose which field of the table/view in the **Data Sources** tab to display, as well as what format is desired.

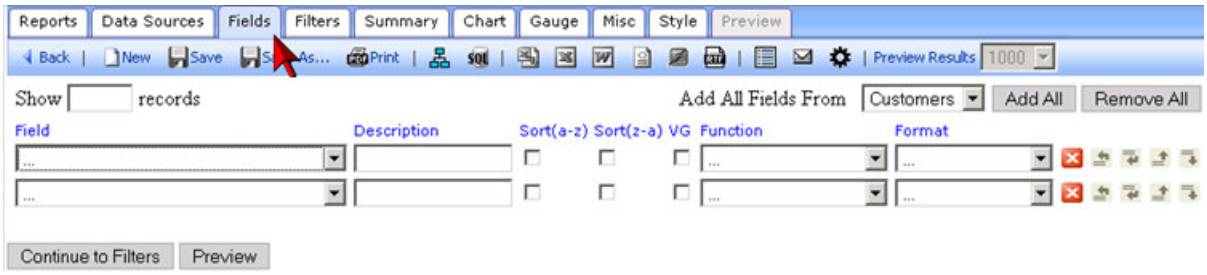


Figure 5-10 Fields Tab

5.3.1 Field Dropdown Menu

The **Field** dropdown menu (Figure 5-11) is a list of the available fields in the table/view that is selected in the **Data Sources** tab. If joining tables/view, the title of the table/view that the field is from appears in parenthesis next to the name of the field. Select the fields to display.

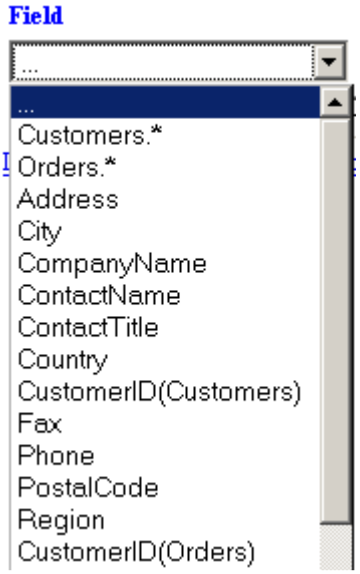


Figure 5-11 Field Dropdown Menu

5.3.2 Description

Inputs the description of the field selected in the **Field** dropdown menu to the left. The description appears as the new title of the field when the table/view is displayed (Figure 5-12).

NOTE: A default description always appears in this box, but may be edited.

Figure 5-12 Description

5.3.3 Sort(a-z), Sort(z-a), and VG Check Boxes and Function Dropdown Menu

Figure 5-13 shows the **Sort(a-z), Sort(z-a),** and **VG Check Boxes** and **Function** dropdown menu.

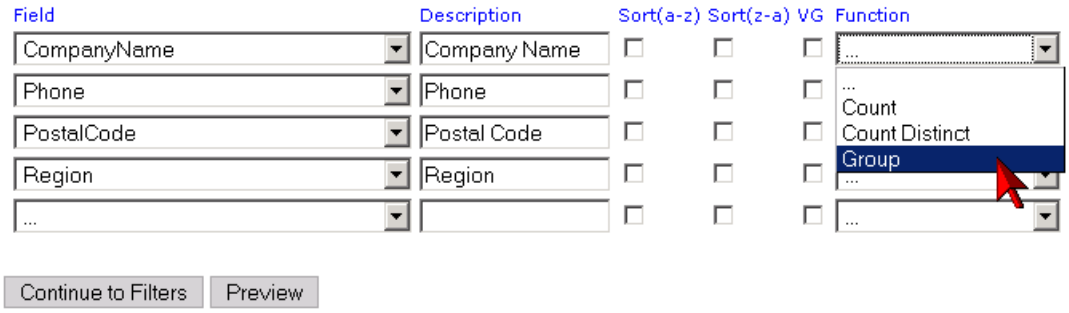


Figure 5-13 Sort, Group, and VG Check Boxes and Function Dropdown Menu

Table 3 explains the **Sort, Group, and VG Check Boxes and Function** dropdown menu features.

Features	Description
Sort (a-z) check box	Check this box if you want the table/view to be sorted by the field selected in the **Field** dropdown menu to the left in ascending order.
Sort (z-a) check box	Check this box if you want the table/view to be sorted by the field selected in the **Field** dropdown menu to the left in descending order.
VG check box	Check this box to change the column for the field selected in the **Field** dropdown menu to the left into subheadings
Function dropdown menu	Functions can be chosen from the dropdown menu. If the **Group** option is selected a group of fields can be created. See Function Descriptions for more information.

Table 3 Description of Sort, Group, and VG Check Boxes and Dropdown Menu

5.3.4 Width

The **Width** is shown in Figure 5-14. Enter the width (default unit is px) of the column in the table produced that holds the values for the field selected in the **Field** dropdown menu directly to the left.

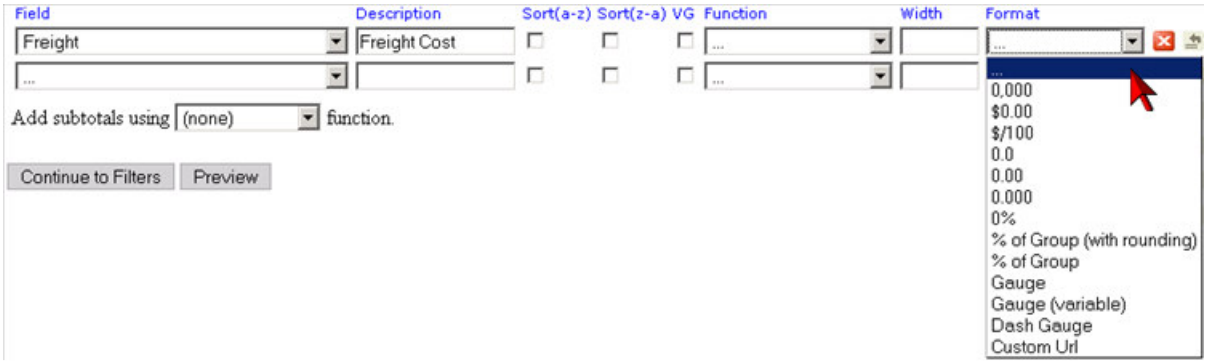


Figure 5-14 Width and Format Dropdown Menu

Figure 5-15 Date Format Dropdown Menu

5.3.5 Format Dropdown Menu

The **Format** dropdown menu is a list of formats for the entries of the field selected in the **Field** dropdown menu directly to the left to appear in.

Format	Description	Examples
0,000	Displays the number as a whole number.	1 123 1,234 1,234,567
$0.00	Displays the number as a currency	$123.45 $0.12
0.0	Displays the number with one decimal place	123.5
0.00	Displays the number with two	123.46

	decimal places	
0.000	Displays the number with three decimal places	123.456
0%	Displays the number as a percentage	1% 12%

If the field in the **Field** dropdown menu directly to the left is a date, the **Format** dropdown menu will look like this:

Format	Description	Examples
Short Date	Displays the date using the mm/dd/yyyy format	8/1/1996
Long Date	Displays the day of the week, month, numeric day, and the year	Friday, August 09, 1996
Short Time	Displays time as hh:mm AM/PM	12:34 AM
Long Time	Displays time as hh:mm:ss AM/PM	12:34:56 PM
Full(short)	Displays the **Long Date** format, followed by the **Short Time** format	Friday, August 30, 1996 4:34 PM
Full(long)	Displays the **Long Date** format, followed by the **Long Time** format	Wednesday, October 23, 1996 2:28:37 AM
Gen(short)	Displays the **Short Date** format, followed by the **Short Time** format	3/12/1996 7:45 PM
Gen(long)	Displays the **Short Date** format, followed by the **Long Time** format	2/27/1996 12:45:13 AM

5.3.6 Function Buttons of Fields Tab

The , **, and** function buttons shown in Figure 5-16 are for the rows that they are in.

Figure 5-16 Function Buttons of Fields Tab

Table 4 describes the function buttons of the **Fields** tab.

Icons	Control Name	Description
	Delete button	Click this button to delete the row the button is on.
	Insert Row button (above)	Click this button to insert a row above the row the button is on.
	Insert Row button (below)	Click this button to insert a row below the row the button is on.
	Move one Row(up)	Click this button to move the filter one row up.
	Move one Row(down)	Click this button to move the filter one row down.

Table 4 Function Buttons of Fields Tab

5.3.7 Add All Fields From Menu

Figure 5-17 shows the **Add All Fields From** menu.

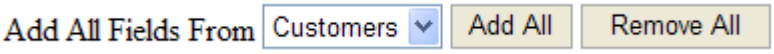


Figure 5-17 Add All Fields From Menu

Table 5 explains the function of each element of the **Add All Fields From** menu.

Features	Description
Add All Fields From dropdown menu	List of tables/views selected in the **Data Sources** tab**.**
Add All button	Adds all the fields from the table/view selected in the **Add All Fields From** dropdown menu.
Remove All button	Removes all the fields from the table/view selected in the **Add All Fields From** dropdown menu.

Table 5 Add All Fields From Menu, Add All / Remove All

5.4 Filters Tab

In the **Filters** tab (Figure 5-18), the fields of the table/view chosen in the **Data Sources** tab can be filtered so that only pertinent entries appear in the table.

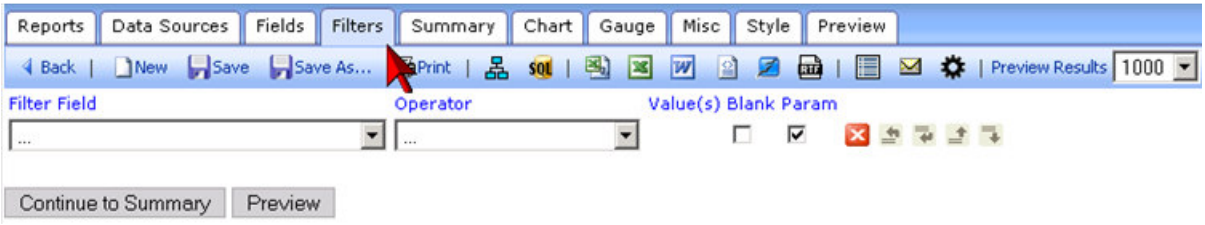


Figure 5-18 Filters Tab

5.4.1 Filter Field Dropdown Menu

The **Filter Field** dropdown menu (Figure 5-19) is a list of the available fields in the table/view that have been selected or created in the **Data Sources** tab. Select the fields to filter. If joining tables/view, the title of the table/view that the field is from appears in parentheses next to the name of the field.

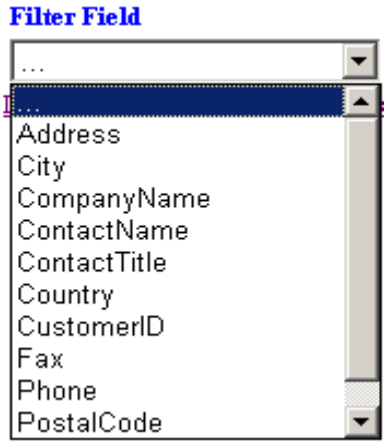


Figure 5-19 Field Dropdown Menu

5.4.2 Operator Dropdown Menu and Value(s)

Figure 5-20 shows the **Operator** dropdown menu and value(s) features.

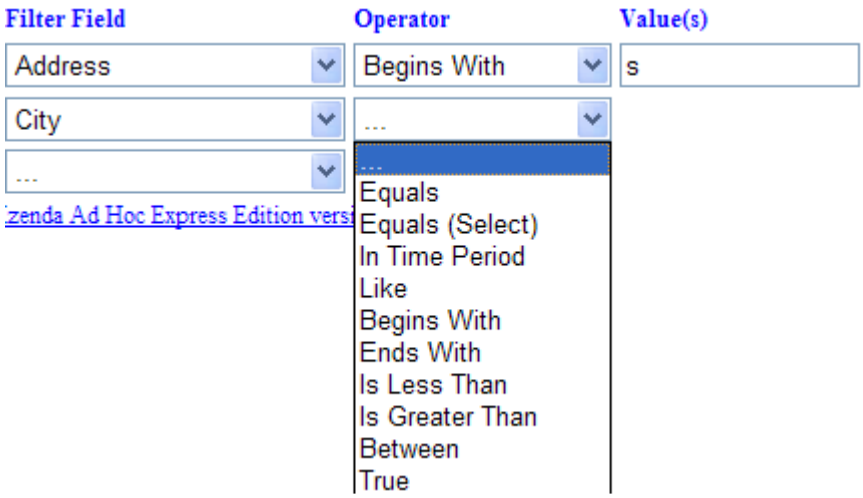


Figure 5-20 Operator Dropdown Menu and Value(s).

Table 6 describes the **Operator** dropdown menu and value(s) features.

Features	Description
Operator dropdown menu	List of operations available to perform on field selected in the **Field** dropdown menu to the left.
Value(s).	Enter the value to which the operation selected in the **Operator** dropdown menu will be applied (for example, "*Begins With* A" only displays items that have entries that start with "A" in the selected field).

Table 6 Description of Operator Dropdown Menu and Value(s)

5.4.3 Function Buttons

The , , , and function buttons of the **Filters** tab are shown in Figure 5-21.

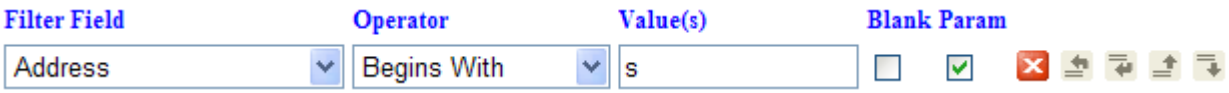


Figure 5-21 Function Buttons

Table 7 describes the function buttons of the **Filters** tab.

Icons	Control Name	Description
	Delete button	Click this button to delete the row the button is on.
	Insert Row button (above)	Click this button to insert a row above the row the button is on.
	Insert Row button (below)	Click this button to insert a row below the row the button is on.
	Move one Row(up)	Click this button to move the filter one row up.
	Move one Row(down)	Click this button to move the filter one row down.

Table 7 Description of Function Buttons

5.5 Summary Tab

In the **Summary** tab (Figure 5-22), a table can be created that summarizes the chosen fields using different functions (for example, *Average*, *Count*, *Maximum*, and so on). You can also make a group of fields by choosing the **Group** option from the **Function** dropdown menu.

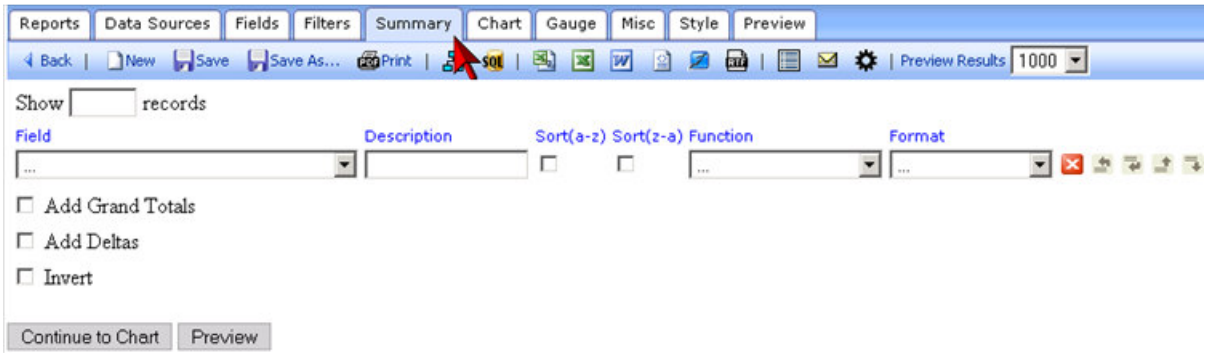


Figure 5-22 Summary Tab

5.5.1 Field Dropdown Menu

The **Field** dropdown menu (Figure 5-23) is a list of available fields in the table/view that have been selected/created in the **Data Sources** tab and that have numeric entries. Select the fields to summarize.

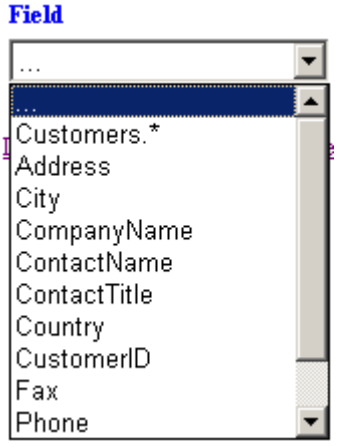


Figure 5-23 Field Dropdown Menu

5.5.2 Description

The **Description** text box (Figure 5-24) inputs the description of the field selected in the **Field** dropdown menu to the left. The description appears as the new title of the field when the **Summary Table** is displayed.

NOTE: A default description always appears in this box, but may be edited.

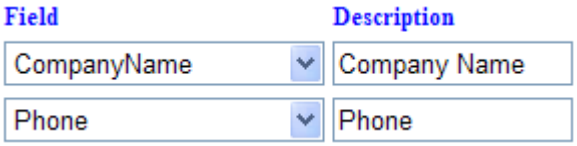


Figure 5-24 Description Text Box

5.5.3 Sort(a-z) Check Box, Sort(z-a) Check Box and Function Dropdown Menu

The **Sort(A)** check box, **Sort(D)** check box, and the **Function** dropdown menu are shown in Figure 5-25.

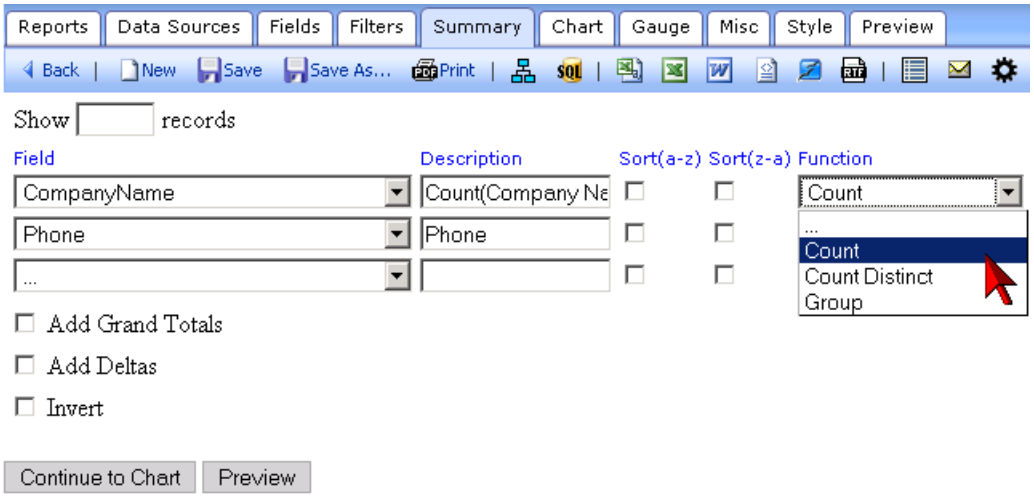


Figure 5-25 Sort Check Box and Function Dropdown Menu

Table 8 describes the **Sort(A)** check box, **Sort(D)** check box, and **Function** dropdown menu features.

Features	Description
Sort(a-z) check box	Checking this box causes the table/view to be sorted by the field selected in the **Field** dropdown menu to the left in ascending order.
Sort(z-a) check box	Checking this box causes the table/view to be sorted by the field selected in the **Field** dropdown menu to the left in descending order.

Function dropdown menu	Lists the functions that may be applied to the field. (for example, choosing *Average* causes the **Summary Table** to display the average value for the entries in the field selected in the **Field** dropdown menu.) **Note:** each selection must be either grouped or a function or all can be **None**.

Table 8 Description of Sort Check Box and Function Dropdown Menu

5.5.4 Format Dropdown Menu

This is the same format as the **Format Dropdown Menu** from the **Fields** tab. See Section **2.3.5**

5.5.5 Function Buttons

The , , , and function buttons are shown in Figure 5-26.

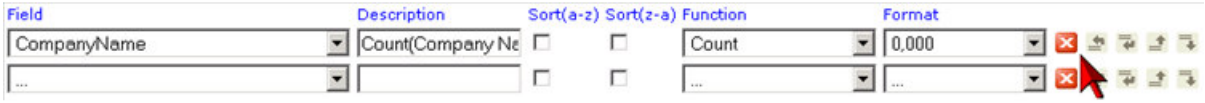


Figure 5-26 Function Buttons

Table 9 describes the function buttons.

Icons	Control Name	Description
	Delete button	Click this button to delete the row the button is on.
	Insert Row button (above)	Click this button to insert a row above the row the button is on.
	Insert Row button (below)	Click this button to insert a row below the row the button is on.
	Move one Row(up)	Click this button to move the filter one row up.
	Move one Row(down)	Click this button to move the filter one row down.

Table 9 Description of Function Buttons

5.6 Chart Tab

In the **Chart** tab (Figure 5-27), a chart can be created using the data in the table/view selected on the **Data Sources** tab**.**

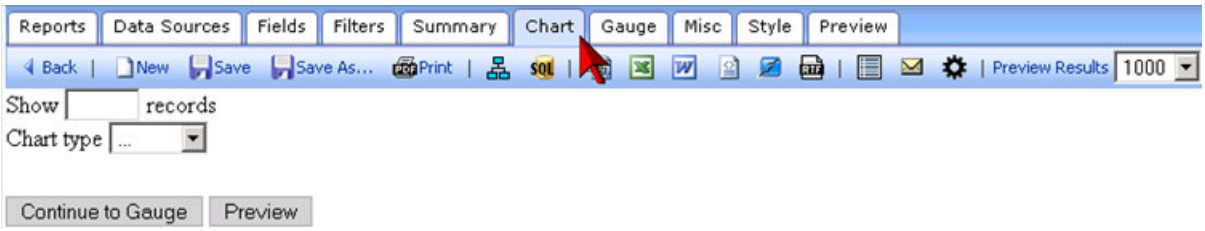


Figure 5-27 Chart Tab

5.6.1 None Selection

When the chart type (Figure 5-28) is **None,** no chart appears.

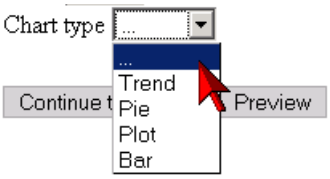


Figure 5-28 None Selection

5.6.2 Trend Selection

When the chart type is **Trend** (Figure 5-29), the chart appears in **Trend** format.

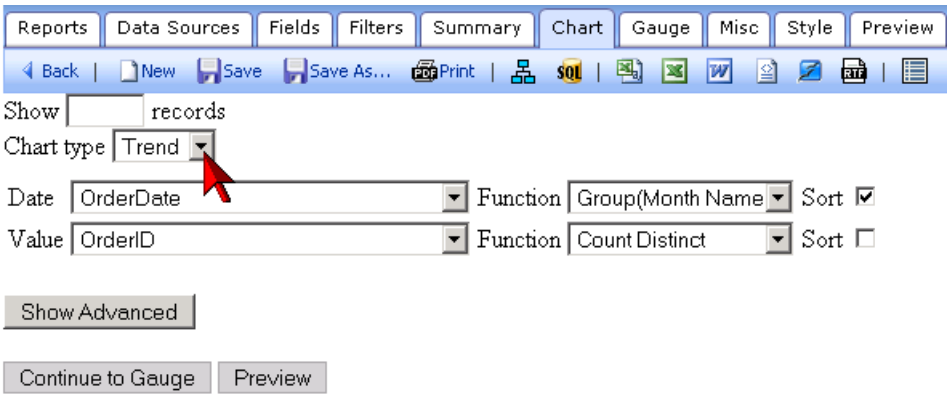


Figure 5-29 Trend Selection

Table 11 describes the features of the **Trend** chart type selection.

Features	Description
Trend chart	By choosing chart type **Trend**, the chart appears in **Trend** format.
Date dropdown menu	Choose any field of date format like birth date, join date, and so on.
Value dropdown menu	Choose any value from the dropdown list.

Table 11 Description of Trend Chart Type

5.6.3 Pie Selection

Figure 5-30 shows the **Pie** (chart) selection menu of the **Chart** tab.

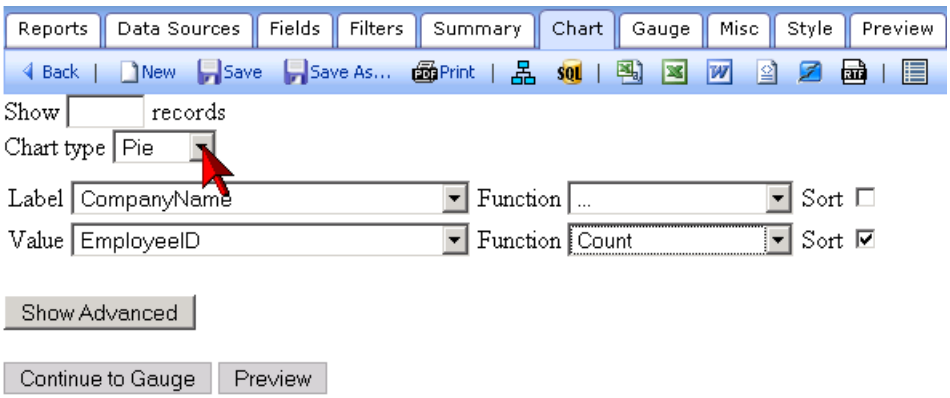


Figure 5-30 Pie (Chart) Selection

Table 12 describes the **Pie** chart selection.

Features	Description
Pie chart	By choosing chart type **Pie**, the chart appears in **Pie** format.
Label dropdown menu	Choose any label from the dropdown list.
Value dropdown menu	Choose any value from the dropdown list.

Table 12 Description of Pie (Chart) Selection

5.6.4 Plot Selection

Figure 5-31 shows the **Plot** (chart) selection of the **Chart** tab.

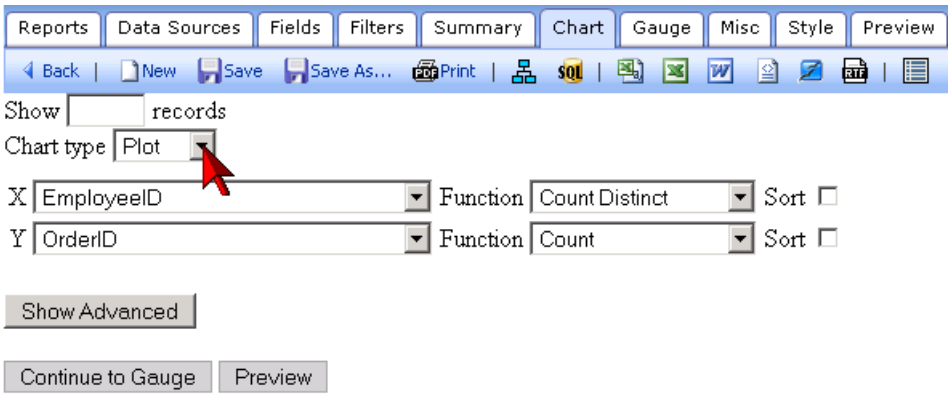


Figure 5-31 Plot Selection

Table 13 describes the **Plot** (chart) selection.

Features	Description
Plot chart	By choosing chart type **Plot**, the chart appears in **Plot** format.
X-axis dropdown menu	Choose any field from the dropdown for the X-axis.
Y-axis dropdown menu	Choose any field from the dropdown for the Y-axis.

Table 13 Description of Plot (Chart) Selection

5.6.5 Bar Selection

Figure 5-32 shows the **Bar** chart selection of the **Chart** tab.

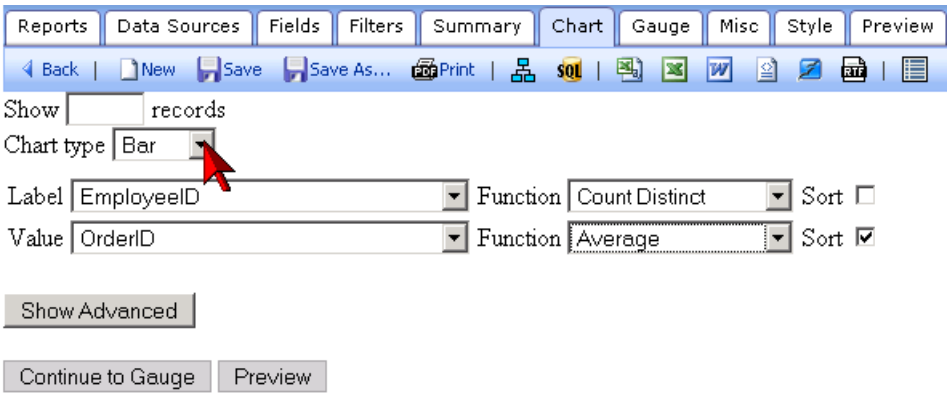


Figure 5-32 Bar Selection

Table 14 describes the **Bar** (chart) selection entries.

Features	Description
Bar chart	By choosing chart type **Bar**, the chart appears in **Bar** format.
Label dropdown menu	Choose any label from the dropdown list.
Value dropdown menu	Choose any value from the dropdown list.

Table 14 Description of Bar (Chart) Selection

5.7 Gauge Tab

In the Gauge tab, you can add a panel of radial or linear gauges to a report.

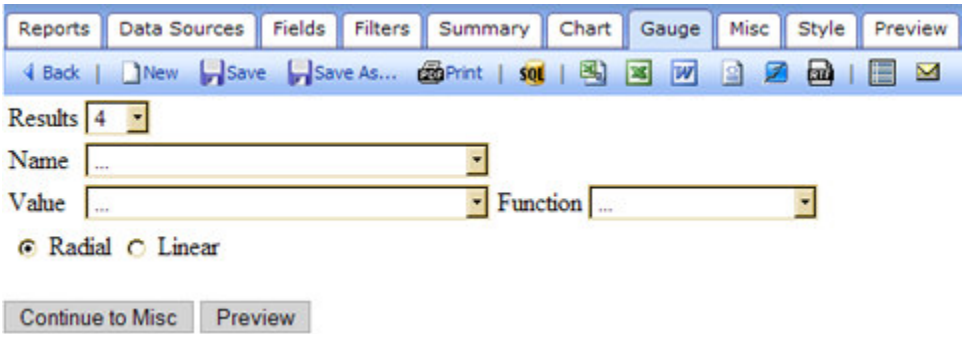
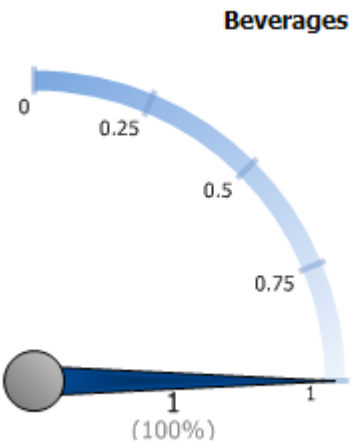
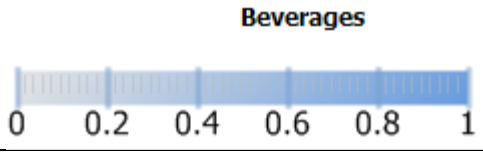


Figure 5-33 Gauge tab contents

Results: Allows you to specify how many gauges you want to show, if you choose to count the number of products in multiple categories, you could specify that you want to only show the first 4 categories by alphabetical order.

Name: Choose the gauge labels
Value: Chose the field to which a function is applied.
Function: Choose a function to apply to the field.
Radial/Linear: See table below.

Radial gauge	
Linear gauge	

5.8 Misc Tab

In the Misc Tab, you can add a title and description of the report. Scheduling is also done in the Misc tab.

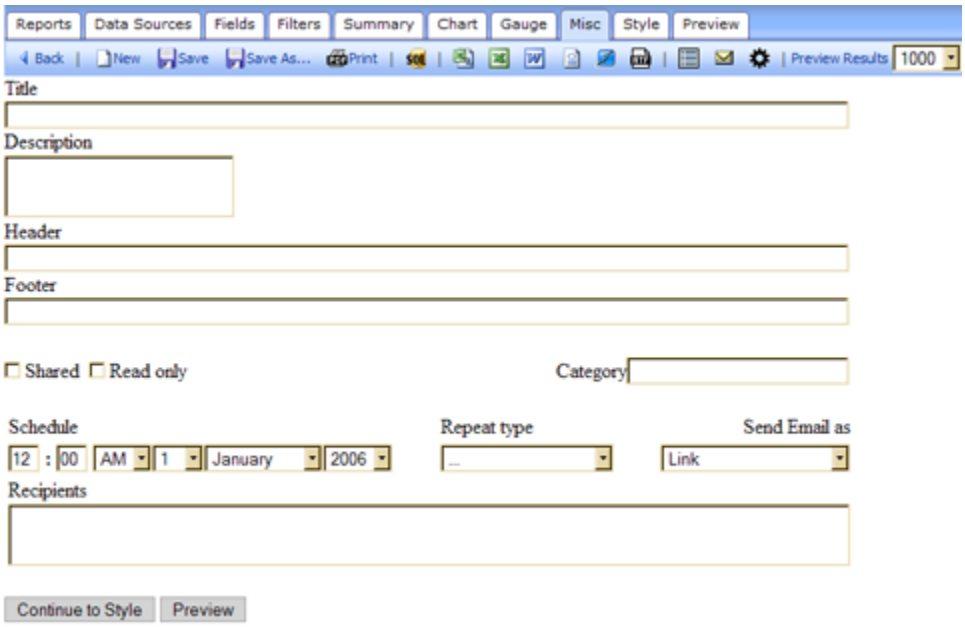


Figure 5-34 Misc tab contents

Title: Enter the title of the report.
Description: Enter a description for the report.
Header: Allows a user to set a report header.
Footer: Allows a user to set a report footer.

Shared/Read only: Selecting "Shared" will allow other users to see your report and modify it. Selecting "Read only" set the report so that it is only modifiable by the report owner.

Category: Set the category of the report. Note: this is set automatically when you save with a category.

Note: The scheduling controls may not be available to all users, if you do not see them, please speak with your system administrator. The scheduling controls allow you to schedule a report to be emailed on a recurring basis.

Schedule: Set the schedule date and time.
Repeat Type: Set the repeat frequency.
Send Email As: Sets the format in which the email is sent.
Recipients: Enter a comma separated list of recipients.

5.9 Style Tab

In the **Style** tab, you can customize the look of the table. You can change the color of the border, header, and rows. The order of report items can also be changed.

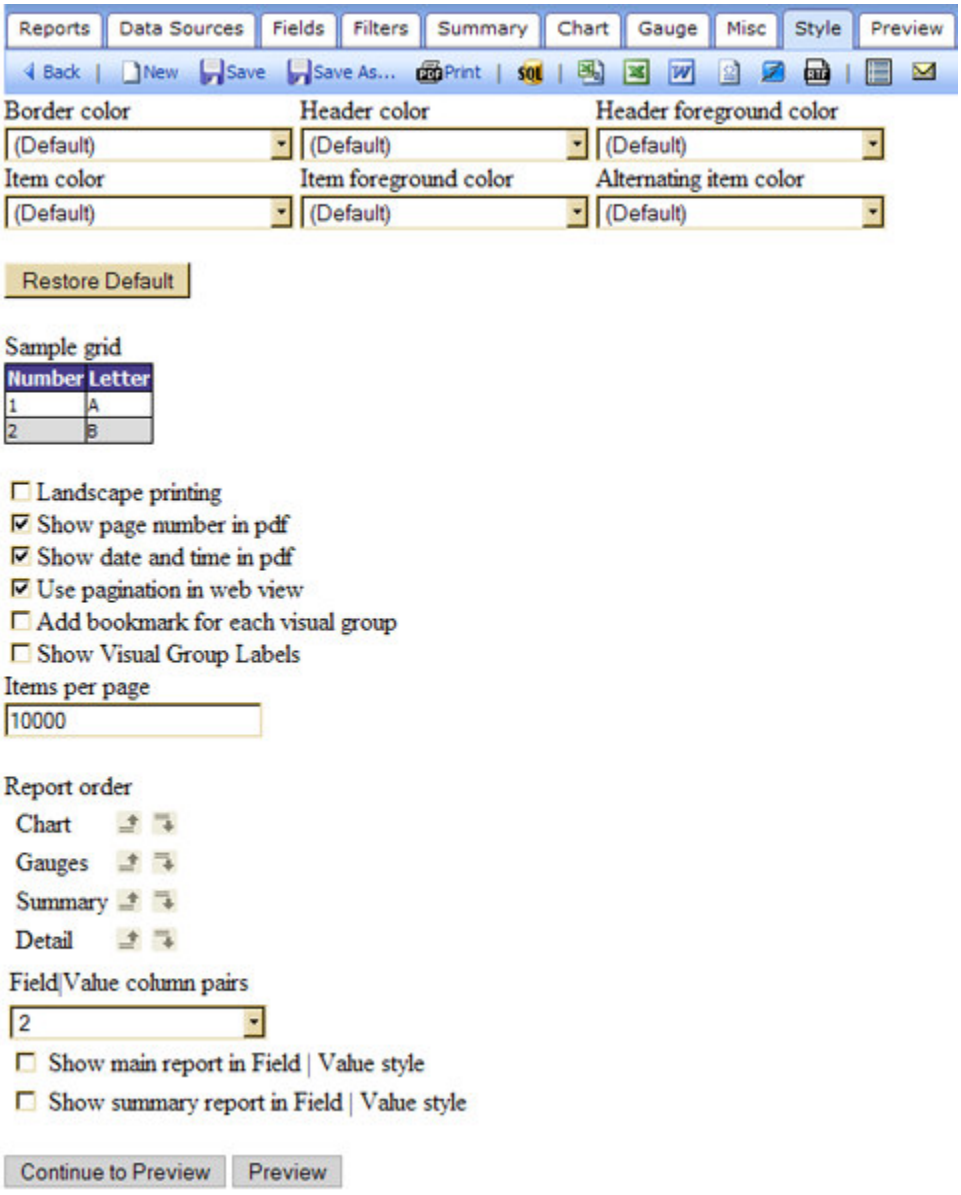


Figure 5-35 Style tab contents

Report style properties can be changed using the drop-downs, when the properties are changed, the sample grid below can be used to see the differences.

The colors which can be changed are: Border color, Header color, Header foreground color, Item color, Item foreground color, and Alternating item color.

Explanations of other properties found on tab are given below.

Landscape printing:	Determines whether the report prints in landscape mode. (can also be set using print properties in the printer dialogue box)
Show page number in pdf:	Sets whether the page numbers are shown in pdf report exports.
how date and time in pdf:	Sets whether the date and time are shown in pdf report exports.
Use pagination in web view:	Sets whether pagination is used in the report viewer.
Add bookmark for each visual group:	Sets whether bookmarks are used in adobe pdf exports.
Show Visual Group Label:	Sets whether the visual group labels are shown.
Items per page:	Allows a user to set the number of items show per page in a grid.
Report order:	Allows the user to set the order of the Summary, Chart, Gauges and Detail grids
Field|Value column pairs:	Allows a user to set the field value style. This is useful for Accounting/financial reports.
Show main report in Field | Value style:	Allows a user to set whether the main detail grid uses Field-Value style
Show summary report in Field | Value style:	Allows a user to set whether the summary grid uses Field-Value style

5.10 Preview Tab

In the **Preview** tab (Figure 5-36), a preliminary version of the created table can be viewed, along with its **Summary Table**, description, and chart. Go back and change selections in the previous tabs and see how they affect the table by returning to it in the **Preview** tab.

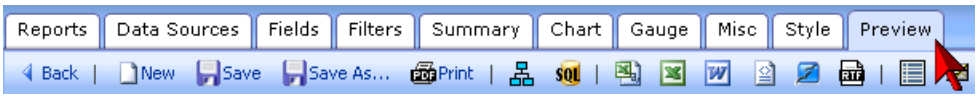


Figure 5-36 Preview Tab

5.11 Toolbar

Figure 5-37 shows the **Toolbar** buttons.

Figure 5-37 Toolbar Buttons

Table 15 describes the functions of the Toolbar buttons.

Icons	Features	Description
Back	Back	Goes to the browser's previous page.
New	New	Creates a new report.
Save	Save	Saves a report.
Save As...	Save As	
Print	Print (PDF Export)	Saves the report as a PDF document.
GO	IE	Runs the report in the web browser.
	Schema	
SQL	SQL	Views the report in SQL mode.
	CSV	Saves the report as a CSV file.
	Excel Spread sheet	Saves the report as a MS-EXCEL file.
	Word Document	Saves the report as a MS-Word document.
	XML document	Saves the report as a XML document.
	Open office document	Saves the report as an Open Office Document.
RTF	RTF document	Saves the report as a RTF document
	Back to Report List	
	E-mail	E-mails a report to a client
	Settings	

Table 15 Description of Toolbar Buttons

5.11.1 Back Button

Use this button to go back to the browser's previous page.

5.11.2 New Button

Use this button to create a new report according to your query. The new report is created, and the existing report is refreshed.

5.11.3 Save Button

The **Save** button is used to save any report, created with a specified name, in the saved reports list. Figure 5-38 shows the Save Any Report script prompt.

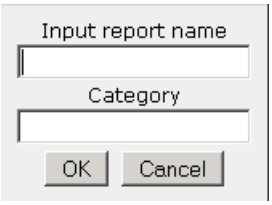


Figure 5-38 Save Any Report

5.11.4 Go Button

The **Go** button is used to run a particular report in the web browser. It opens a new page to show the report as an HTML report (Figure 5-39).

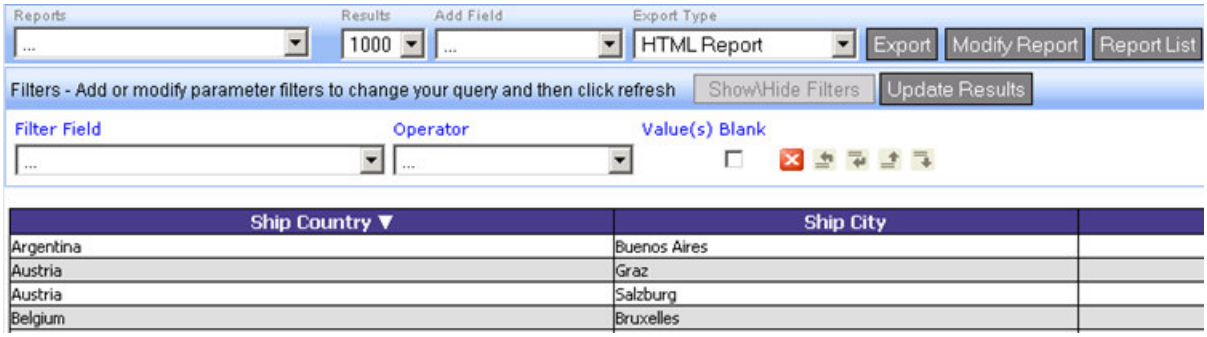


Figure 5-39 To Run the Report as a HTML Report

5.11.5 SQL View

This button is used to view the report in SQL view (Figure 5-40). It allows the report to be opened directly or saved for future use.

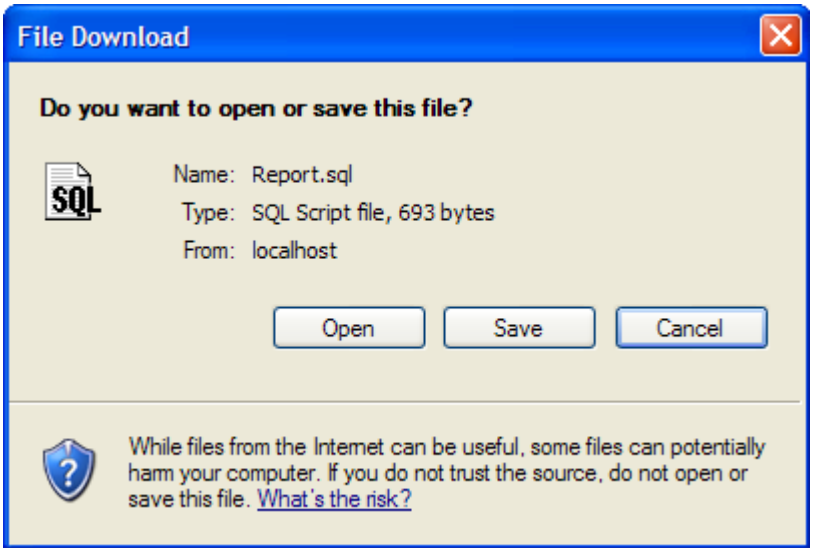

File Download
Do you want to open or save this file?
Name: Report.sql
Type: SQL Script file, 693 bytes
From: localhost
Open
Save
Cancel
While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. What's the risk?

Figure 5-40 Save Any Report as SQL Format

5.11.6 PDF Button

The **Pdf** button is used to save any report as a .pdf file format that can be used later. Specify the location and the file name for better identification. Figure 5-41 shows the file download screen.

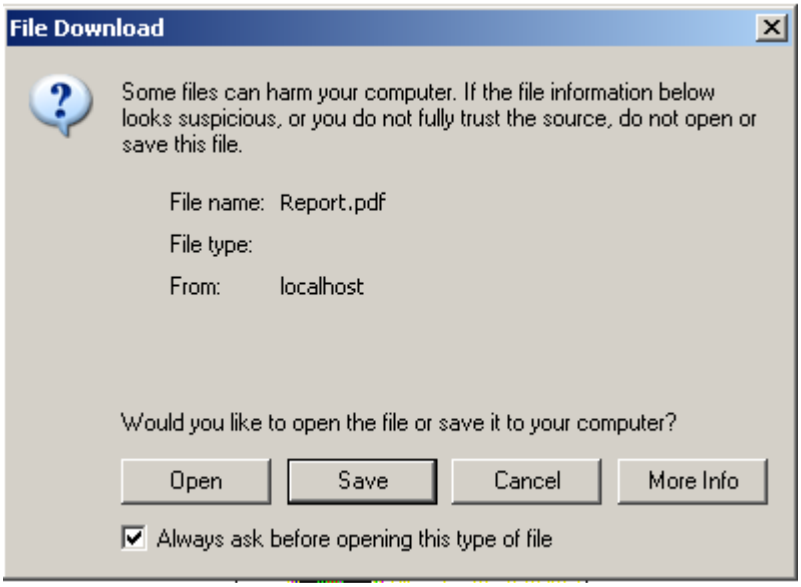

File Download
Some files can harm your computer. If the file information below looks suspicious, or you do not fully trust the source, do not open or save this file.
File name: Report.pdf
File type:
From: localhost
Would you like to open the file or save it to your computer?
Open
Save
Cancel
More Info
Always ask before opening this type of file

Figure 5-41 Save Any File as PDF Format

Figure 5-42 shows the screen displayed after the download is complete.

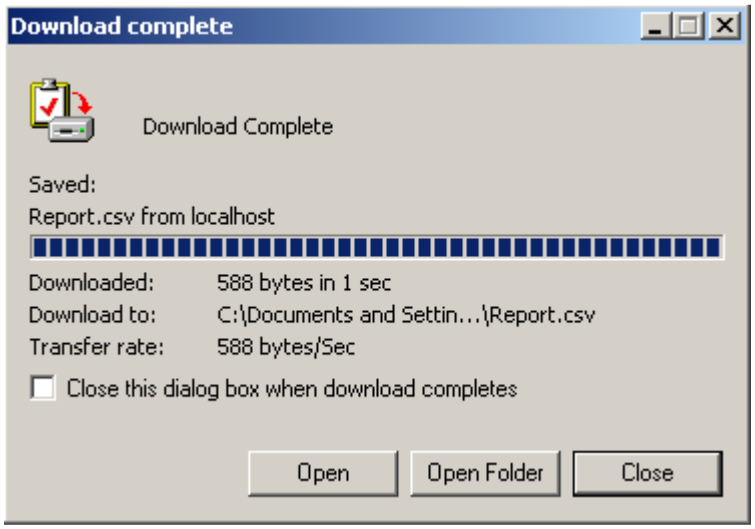


Figure 5-42 After Completed Download

5.11.7 CSV Button

The **CSV** button is used to save any report in a specified location as a .CSV format, which can be retrieved later.

5.11.8 Spread Sheet Button

The **Spread Sheet** button is used to save any report in an MS-EXCEL file format , which can retrieved later. Specify the save location and the file name.

5.11.9 Word Document Button

The **Word Document** button is used to save any report as an MS-WORD document, which can be retrieved later. Specify the location and name only.

5.11.10 XML button

The **XML** button is used to save any report as an XML document, which can be retrieved later. Specify the location and name only.

5.11.11 Open Office Document

This button is used to save any report as an **Open Office Document**, which can be retrieved later. Specify the location and name only.

5.11.12 RTF Document

This button is used to save any report as an **RTF Document**, which can be retrieved later. Specify the location and name only.

5.11.13 E-mail Report

This button is used to e-mail the report to a client. Specify the e-mail address of the recipient only.

6.0 FUNCTION DESCRIPTIONS

The following is a table of functions available for use in the Fields and Summary tab of the Report Designer.

Function Name	Description
Group	Groups field values together for aggregating
Count	Counts the number of values in a column
Count Distinct	Counts the number of distinct values in a column
Sum	Sums the value in a field
Average	Takes the average value of a field
Maximum	Takes the maximum value in a field
Minimum	Takes the minimum value in a field
Group(Date),(Day),(Month),(Year)	Groups a date field by its value
Group(Month Name)	Groups a date field by its month value and displays the name (March) instead of (03)

7.0 GLOSSARY

Database	A collection of data arranged for ease, speed of search, and retrieval.
Entry	A single piece of data that belongs to a field.
Field	A set of entries that are grouped together because of similar properties. The ***Fruit*** field contains entries that are either apple, peach, or orange.
Table	A set of data organized into fields and arranged in rows and columns.
View	A set of tables that have been joined by similar fields with identical entries.